

## MAINTAIN OWNERS/OFFICERS

Introduction	This section of the document will explain how an authorized user can view/modify/add owner/officer information.
Helpful Hints	<ul style="list-style-type: none"> <li>The combined ownership percentage of all owners on the account cannot exceed 100%.</li> <li>It is not possible to add a second owner/officer when the business type is sole proprietorship.</li> <li>The owner can be an individual owner or a legally formed entity.</li> <li>The ownership information that can be added to an account is limited to five.</li> </ul>

### Step-by-Step Instructions:

#### Viewing owner/officer information:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the 'Maintain Owners/Officers' link from the list of available maintenance functions. The screen shown below will appear and you can view the owner/officer information.

NOTE: If you wish to see the history associated with the owner/officer information, click on 'Link to Previous Owner/Officers'.

Change Password   Logoff					
<a href="#">Employer Home</a> <a href="#">FAQ</a> <a href="#">Workflow - My Inbox</a> <a href="#">Account Maintenance</a> <ul style="list-style-type: none"> <li>View Employer Account Profile</li> <li>Address Information</li> <li>Employer Appeals</li> <li>Maintain Employer Name</li> <li><b>Maintain Owners/Officers</b> <ul style="list-style-type: none"> <li>Maintain Employer Reporting Units</li> <li>Provide Information on the</li> </ul> </li> </ul>	<b>Employer Information</b> Employer Account Number: 001      Employer Name: WI				
	<b>Owner/Officer Information</b> Please select "Update" to add or modify Owner/ Officer Information.				
	<b>Title</b>	<b>Name</b>	<b>Address</b>	<b>SSN/FEIN</b>	<b>Percentage of Ownership</b>
	Other	G, J	19 Staniford St, Boston, MA 02114-2502	001-00-0000	50.00%
	<a href="#">Link to Previous Owner/Officers</a>				
				<input type="button" value="Update"/>	

#### Modifying owner/officer information:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the 'Maintain Owners/Officers' link from the list of available maintenance functions.

3. The following page will appear. Click on 'Update'.

Change Password   Logoff															
Employer Home															
<p>FAQ</p> <p>Workflow - My Inbox</p> <p>Account Maintenance</p> <ul style="list-style-type: none"> <li>View Employer Account Profile</li> <li>Address Information</li> <li>Employer Appeals</li> <li>Maintain Employer Name</li> <li><b>Maintain Owners/Officers</b></li> <li>Maintain Employer Reporting Units</li> <li>Provide Information on the</li> </ul>															
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Title	Name	Address	SSN/FEIN	Percentage of Ownership											
Other	G, J	19 Staniford St, Boston, MA 02114-2502	001-00-0000	50.00%											

4. The following page will appear, listing the existing addresses. Choose the address you wish to modify using the radio button to the left. Click on the 'Modify' button.

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Click on the Radio button to select this record.

- The following page will appear. Make changes as necessary and click on the 'Save' button to complete the changes.

To inactivate an existing owner/officer enter the effective end date of ownership.

[Change Password](#) | [Logoff](#)

[Employer Home](#)  
[FAQ](#)  
[Workflow - My Inbox](#)  
[Account Maintenance](#)

- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers**
- Maintain Employer Reporting Units
- Provide Information on the Purchase or Sale of a Business
- Request Worker Status Determination
- Suspend Employer Account
- Voluntary Contribution
- Third Party Administrator (TPA) Authorization

[Benefit Charge Activities](#)  
[Correspondence](#)  
[Employment and Wage Detail Reporting](#)  
[Payment Information](#)  
[User Maintenance](#)

**Employer Information**

Employer Account Number: **0C**      Employer Name: **WI**

**Review Owner/Officer Information**

- To **ADD** an Owner/Officer, enter the information in the Add/Modify section below.
- To **MODIFY** existing information, identify the record by selecting the radio button to the left of the name and select "Modify".
- To **INACTIVATE** an entry, identify the record by selecting the radio button to the left of the name and "Modify". Then enter the Effective End Date of Ownership / Appointment.
- You may not enter more than 5 owner/officers.
- After completing all updates to the Owner/Officer information, select "Submit".

	Title	Name	SSN/FEIN	Contact Information	% Ownership
<input checked="" type="radio"/>	Other	G, J	001-00-0000	19 Stanford St, Boston, MA 02114-2502	50.00%
<b>Total Owners:</b>			<b>1</b>	<b>Total Percentage:</b>	<b>50.00%</b>

**Add Owner/Officer Information**

- If the Owner/Officer is an individual, complete the individual Owner/Officer section and Additional Information section.
- If the Owner/Officer is a business/entity, complete the Business/Entity Owner/Officer section and Additional Information section.

**Individual Owner/Officer**

**OR**

**Business/Entity Owner/Officer**

First Name: **J**  
Middle Initial:  
Last Name: **G**  
SSN: **001000000**

Legal Entity Name:  
FEIN:

**Additional Information**

- The Additional Information section is required for both the Individual Owner/Officer and the Business/Entity Owner/Officer.

Business Title: **Other** \*  
Percent of Ownership: **50** \*  
First Date of Ownership/Appointment: **1/1/2009**  
Effective End Date of Ownership:  
Is the owner/officer compensated for their services?: ☒ Yes ☐ No \*  
Address Line 1: **19 Stanford St** \*  
Address Line 2:  
City: **Boston** \*  
State: **MA - Massachusetts**  
Zip Code: **02114-2502**  
Country: **US - United States Of America** \*  
Email:

Save

Reset

Cancel

Modify the information in this section

### Adding owner/officer information:

- Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
- Click on the 'Maintain Owners/Officers' link from the list of available maintenance functions. The following page will appear. Click on 'Update'.

[Change Password](#) | [Logoff](#)

[Employer Home](#)  
[FAQ](#)  
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[Account Maintenance](#)

- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers**

**Employer Information**

Employer Account Number: **00**      Employer Name: **W**

**Owner/Officer Information**

Please select "Update" to add or modify Owner/ Officer Information.  
No records found...  
[Link to Previous Owner/Officers](#)

Update

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3. The following page will appear. Enter the requested information here.

NOTE: If you are adding a legal entity as owner/officer, the only identifying information provided should be the name of the Legal Entity and FEIN. If an individual is being added as owner/officer, the only identifying information provided should be the individual's name and SSN. **Do not enter both sets of identifying information under the same record.**

[Change Password](#) | [Logout](#)

[Employer Home](#)  
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[Account Maintenance](#)  

- View Employer Account Profile
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[Benefit Charge Activities](#)  
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[User Maintenance](#)

Employer Information

Employer Account Number: **0C**
Employer Name: **W**

Review Owner/Officer Information

- To **ADD** an Owner/Officer, enter the information in the Add/Modify section below.
- To **MODIFY** existing information, identify the record by selecting the radio button to the left of the name and select "Modify".
- To **INACTIVATE** an entry, identify the record by selecting the radio button to the left of the name and "Modify". Then enter the Effective End Date of Ownership / Appointment.
- You may not enter more than 5 owner/officers.
- After completing all updates to the Owner/Officer information, select "Submit".

No records found...

Modify

Add Owner/Officer Information

- If the Owner/Officer is an individual, complete the individual Owner/Officer section and Additional Information section.
- If the Owner/Officer is a business/entity, complete the Business/Entity Owner/Officer section and Additional Information section.

Individual Owner/Officer	OR	Business/Entity Owner/Officer
First Name: <input type="text"/>		Legal Entity Name: <input type="text"/>
Middle Initial: <input type="text"/>		FEIN: <input type="text"/>
Last Name: <input type="text"/>		
SSN: <input type="text"/>		

Additional Information

- The Additional Information section is required for both the Individual Owner/Officer and the Business/Entity Owner/Officer.

Business Title:

Percent of Ownership:

First Date of Ownership/Appointment:

Is the owner/officer compensated for their services?: ☐ Yes ☐ No

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Country:

Email:

Select the "ADD" button to **SAVE** the entered Owner/Officer information.

Add

Submit

Cancel

Complete the information requested in this section to add owner/officer information.

Complete the information requested in this section to add owner/officer information.

Click on 'Add' to save the new owner/officer record. Do not click 'Submit'.

4. The following screen will appear, summarizing the owner/officer information you just added. Click on the 'Submit' button at the bottom of the page to complete the addition of the record.

Change Password | Logoff

Employer Home

FAQ

Workflow - My Inbox

Account Maintenance

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Benefit Charge Activities

Correspondence

Employment and Wage Detail Reporting

Payment Information

User Maintenance

**Employer Information**

Employer Account Number: 007      Employer Name: W

**Review Owner/Officer Information**

- To **ADD** an Owner/Officer, enter the information in the Add/Modify section below.
- To **MODIFY** existing information, identify the record by selecting the radio button to the left of the name and select "Modify".
- To **INACTIVATE** an entry, identify the record by selecting the radio button to the left of the name and "Modify". Then enter the Effective End Date of Ownership / Appointment.
- You may not enter more than 5 owner/officers.
- After completing all updates to the Owner/Officer information, select "Submit".

	Title	Name	SSN/FEIN	Contact Information	% Ownership
<input type="radio"/>	Other	G, J	001-00-0000	19 Staniford St, Boston, MA 02114-2502	50.00%
<b>Total Owners:</b>			<b>1</b>	<b>Total Percentage:</b>	<b>50.00%</b>

Modify

**Add Owner/Officer Information**

- If the Owner/Officer is an individual, complete the individual Owner/Officer section and Additional Information section.
- If the Owner/Officer is a business/entity, complete the Business/Entity Owner/Officer section and Additional Information section.

Individual Owner/Officer	OR	Business/Entity Owner/Officer
First Name: <input type="text"/>		Legal Entity Name: <input type="text"/>
Middle Initial: <input type="text"/>		FEIN: <input type="text"/>
Last Name: <input type="text"/>		
SSN: <input type="text"/>		

**Additional Information**

- The Additional Information section is required for both the Individual Owner/Officer and the Business/Entity Owner/Officer.

Business Title:	Select One <input type="text"/>	*
Percent of Ownership:	<input type="text"/>	*
First Date of Ownership/Appointment:	<input type="text"/>	*
Is the owner/officer compensated for their services?:	<input type="radio"/> Yes <input type="radio"/> No	*
Address Line 1:	<input type="text"/>	*
Address Line 2:	<input type="text"/>	*
City:	<input type="text"/>	*
State:	MA - Massachusetts <input type="text"/>	
Zip Code:	<input type="text"/>	
Country:	US - United States Of America <input type="text"/>	*
E-Mail:	<input type="text"/>	

- Select the "ADD" button to **SAVE** the entered Owner/Officer information.

Add

Submit Cancel

Click 'Submit' to confirm your changes.

If	Then
Change of owner/officer information is due to purchase or sale of a business	You must use the process 'Provide information on the sale or purchase of a business.'

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